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Maryland
Department of Economic &
Employment Development

LABOR MARKET DIMENSIONS

A Monthly Report on the Dynamics of the Labor Market in Maryland

October, 1990

Maryland Department of Economic and Employment Development
Office of Labor Market Analysis and Information
1100 North Eutaw Street
Baltimore, Maryland 21201

William Donald Schaefer, Governor
J. Randall Evans, Secretary

LABOR MARKET DIMENSIONS
OCTOBER, 1990

MARYLAND

Maryland's labor market statistics sent out mixed signals in October. Employment, while declining over the month, failed to produce an increase in the jobless rate. The movement of workers out of the job market was the primary factor responsible for maintaining Maryland's unemployment rate on an even keel. For the fourth consecutive month, Maryland's unemployment rate remained unchanged at 4.5 percent during October.

Nationally, the jobless rate ebbed slightly from 5.5 percent in September to 5.4 in October.

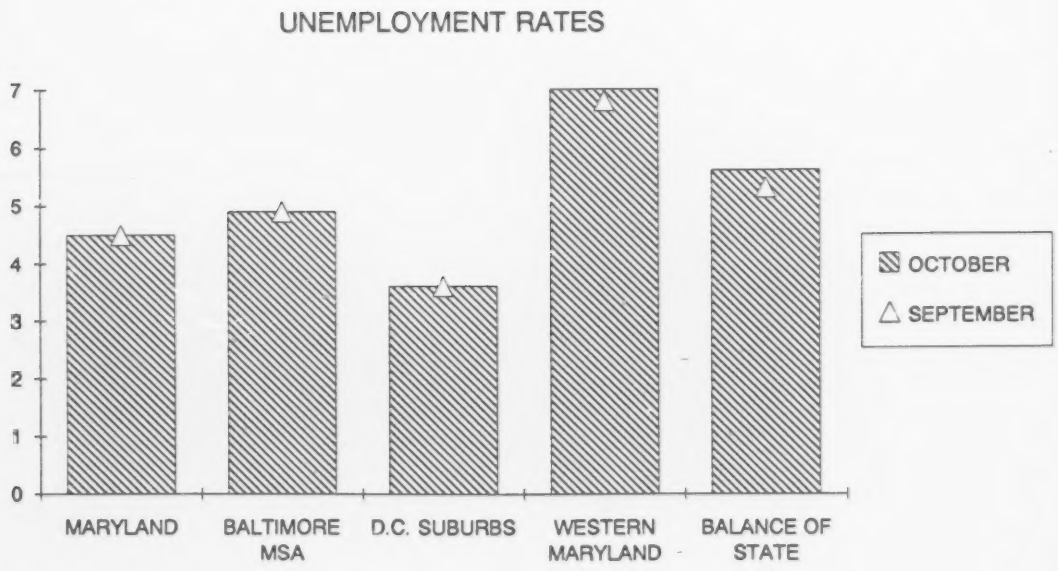
During October, the number of workers in the state declined by 15,443 to 2,415,824. With this decline, statewide employment dropped to its second lowest level recorded thus far this year. The impact of this decline on the unemployment rolls, however, was negligible because of an almost identical drop in the labor force over the month. The exodus of an estimated 15,373 participants from the job market helped to hold down the jobless increase to just 70 people during October.

	October 1990	September 1990	October 1989
Civilian Labor Force	2,529,766	2,545,139	2,522,809
Total Employment	2,415,824	2,431,267	2,440,195
Total Unemployment	113,942	113,872	82,614
Unemployment Rate	4.5	4.5	3.3
National Civilian Unemployment Rate	5.4	5.5	5.0

From an historical perspective, October's labor market trends have tended to be somewhat unpredictable, largely because of seasonal factors. For the past few years, however, both labor force and employment levels have risen while unemployment indicators have declined. Last year, October's unemployment rate stood at 3.3 percent, following a drop of 0.4 percentage points from September.

TOTAL UNEMPLOYMENT - MARYLAND AND REGIONS

Region	October 1990		September 1990	
	Number	Rate	Number	Rate
Maryland	113,942	4.5	113,872	4.5
Baltimore Metropolitan Area	58,746	4.9	59,023	4.9
Maryland's D.C. Suburbs	35,785	3.6	35,984	3.6
Western Maryland	7,367	7.0	7,218	6.8
Balance of State	12,045	5.6	11,648	5.3



INDUSTRY DEVELOPMENTS

While the up and down movements in industrial payrolls over the past few months have made it difficult to pinpoint underlying trends, it does appear that local employers may be tightening the reins somewhat in response to the weakening in the national economy. Activity on Maryland's industrial payrolls during October was indicative of the recent slowing in the economy. Very little new job generation occurred during October. The overall increase in industrial employment was, instead, the result of continuing recall activity in state and local education facilities. While education recalls contributed some 14,000 jobs during October, the impact of this gain on overall employment was diminished by layoff activity elsewhere on industry payrolls.

On the goods-producing side of the economy, job cutbacks lowered employment totals in both the manufacturing and construction sectors. Job losses in manufacturing, most of which were seasonal, were limited to just 200. The only occurrence out of the norm was the report of strike activity in industrial machinery and equipment. In construction, on the other hand, the employment level was depressed by the loss of an estimated 1,500 jobs. While employment reductions were recorded in all phases of construction, about two-thirds of the overall industry decline resulted from layoffs among general building contractors.

On private sector payrolls, the employment situation was driven primarily by seasonal layoffs, particularly in the trade and services industries. Some layoffs, such as those in eating and drinking places and auto dealers, however, exceeded seasonal expectations. In the real estate industry, seasonal economics, combined with the general slowdown in the housing market, were responsible for reduced employment levels. On the upside, employment increased over the month in general merchandise stores, food stores, health services, and educational services.

Production workers in Maryland's manufacturing industries experienced a drop in weekly earnings during October, primarily due to a reduction in overtime hours. During October, working an average of 41.1 hours per week yielded a weekly paycheck of $479.23, down $4.81 from September's estimate. Even with this decline, production workers are earning more than they did last year when a 41.6 hour workweek resulted in weekly earnings of $468.00.

In the durable goods component, monthly trends were quite different. Although the hourly wage dropped by $.01 during October, a lengthening of the workweek from 42.1 to 42.3 hours boosted weekly earnings by slightly more than $2.00 to $521.14 per week. Within durable goods, weekly wages increased by the highest margin, of $16.31 to $442.66, in electronic equipment.

In nondurable goods, the average weekly wage dropped from $451.58 to $442.30 as worker hours were reduced to 40.1 and hourly earnings were cut back to $11.03. Weekly hours and earnings dropped in all nondurable goods industries with the exception of textile mill and chemical products.

In the Baltimore Metro Area, a shorter workweek lowered weekly earnings from $503.93 to $498.95. In durable goods, although workweeks increased marginally, a drop in hourly earnings reduced weekly paychecks by $.39 to $536.29. In nondurable industries, a shortened workweek and lower hourly pay rates caused weekly draws to drop by $7.00 to $458.94 in October.

MARYLAND
NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY
BY PLACE OF EMPLOYMENT
(IN THOUSANDS)
OCTOBER 1990

Major Industry Group	October 1990	September 1990	October 1989
Total Nonagricultural Employment	2,181.1	2,174.6	2,165.6
Goods Producing	372.3	374.0	377.3
Mining	1.7	1.7	1.7
Construction	167.0	168.5	166.8
Manufacturing	203.6	203.8	208.8
Durable Goods	104.9	105.1	110.1
Nondurable Goods	98.7	98.7	98.7
Service Producing	1,808.8	1,800.6	1,788.3
Transportation & Public Utilities	102.8	103.0	101.2
Trade	542.3	545.3	540.8
Wholesale Trade	114.0	114.1	114.2
Retail Trade	428.3	431.2	426.6
Finance, Insurance, & Real Estate	132.2	132.5	131.8
Services	604.6	605.6	596.6
Total Government	426.9	414.2	417.9
Federal	136.1	136.6	134.7
State	99.0	96.7	97.3
Local	191.8	180.9	185.9

* The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Current data preliminary; previous month revised.

Additional industry detail available upon request.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED MANUFACTURING INDUSTRIES
OCTOBER 1990

Major Industry Grouping	AVERAGE WEEKLY HOURS		AVERAGE WEEKLY EARNINGS		AVERAGE HOURLY EARNINGS	
	Oct.1990	Sept.1990	Oct.1990	Sept.1990	Oct.1990	Sept.1990
MARYLAND						
Manufacturing	41.1	41.3	$479.23	$484.04	$11.66	$11.72
Durable Goods	42.3	42.1	521.14	519.09	12.32	12.33
Lumber and Wood Products	39.4	39.8	355.39	352.23	9.02	8.85
Stone, Clay & Glass Products	43.7	44.4	495.56	508.38	11.34	11.45
Primary Metal Industries	43.8	44.3	691.60	701.71	15.79	15.84
Blast Furnaces	44.1	44.8	701.19	715.46	15.90	15.97
Fabricated Metals	40.8	40.4	416.57	424.20	10.21	10.50
Industrial Machinery	40.9	41.5	502.25	510.87	12.28	12.31
Electronic Equipment	46.4	45.5	442.66	426.34	9.54	9.37
Transportation Equipment	41.1	39.9	620.61	604.49	15.10	15.15
Instruments and Related Products	42.5	42.0	588.63	579.60	13.85	13.80
Miscellaneous Manufacturing Indus.	40.1	39.7	380.95	371.20	9.50	9.35
Nondurable Goods	40.1	40.5	442.30	451.58	11.03	11.15
Food and Kindred Products	41.3	42.3	418.78	435.69	10.14	10.30
Textile Mill, Apparel	36.1	35.6	276.17	270.56	7.65	7.60
Paper and Allied Products	41.4	41.9	484.38	498.61	11.70	11.90
Printing and Publishing	37.1	37.7	489.72	501.41	13.20	13.30
Chemicals and Allied Products	43.3	43.3	554.24	553.81	12.80	12.79
Rubber and Plastic Products	42.6	43.7	417.48	434.82	9.80	9.95
BALTIMORE METROPOLITAN AREA						
Manufacturing	41.1	41.3	$498.95	$503.93	$12.14	$12.18
Durable Goods	41.8	41.7	536.29	536.68	12.83	12.87
Nondurable Goods	40.4	40.8	458.94	465.94	11.36	11.42

BALTIMORE METROPOLITAN AREA

Following statewide trends, unemployment in the Baltimore Metro Area remained unchanged at 4.9 percent even though a drop in the labor force helped to reduce the jobless rolls by nearly 300 people. As was true statewide, this marks the fourth consecutive month that unemployment in the region has failed to move. Last October, just 3.5 percent of the region's labor force participants were counted on the jobless rolls. Local unemployment rates remained relatively static over the month. The most noteworthy movement occurred in Harford County where the addition of about 200 persons to the unemployment rolls increased joblessness from 4.0 percent to 4.2 percent.

MARYLAND D.C. AREA SUBURBS

Unemployment in Maryland's D.C. suburbs, also holding steady at 3.6 percent over the month, ranked as the lowest in the state. Within the suburban area, unemployment in Charles County rose from 3.0 percent to 3.3 percent in response to layoffs in the construction industry. In Frederick County, on the other hand, workers exiting the job market helped to reduce the level of unemployment by nearly 200 persons. With this decline, the county's unemployment rate dropped back from 4.9 percent to 4.7 percent.

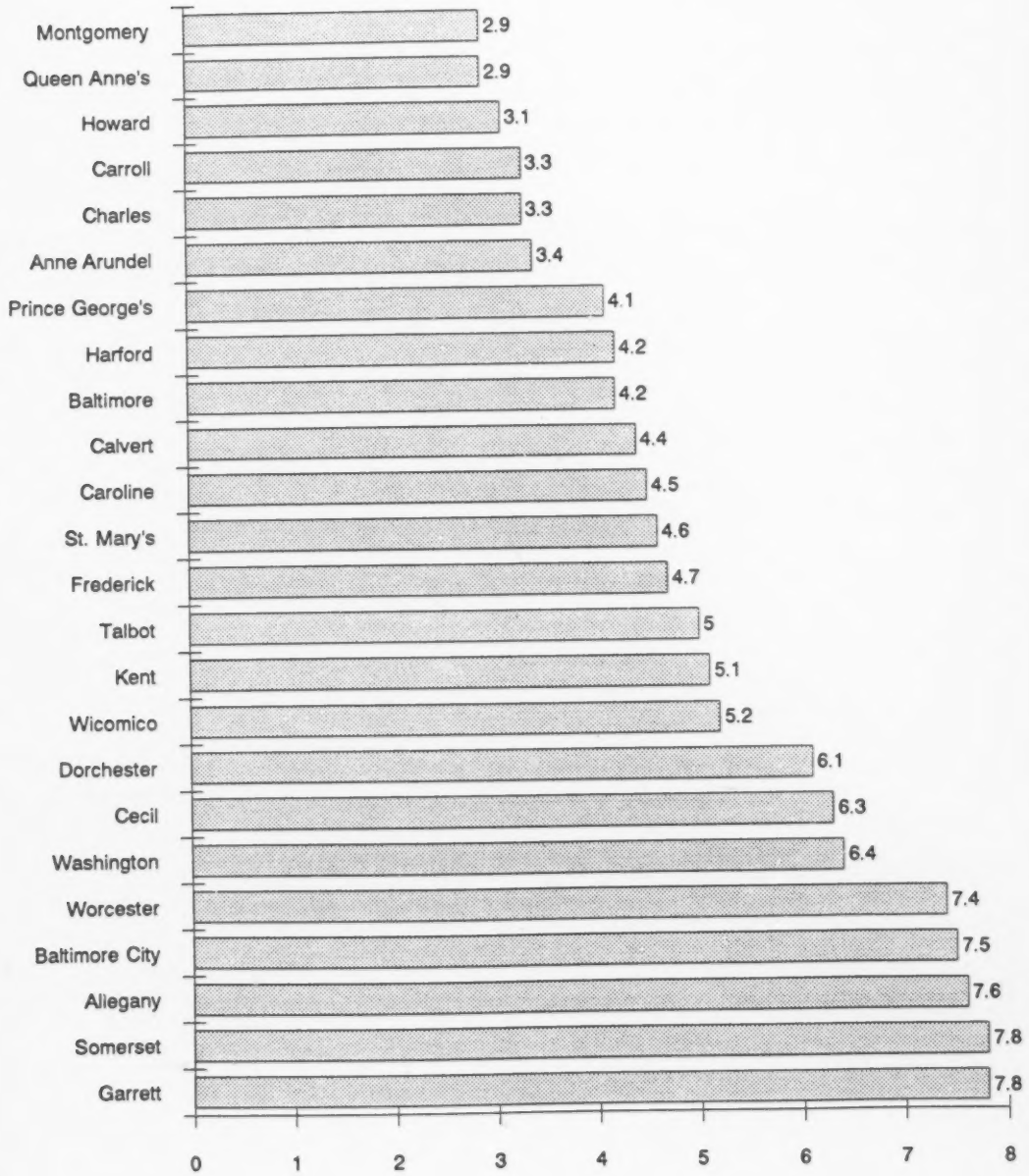
WESTERN MARYLAND

Unemployment in the western portion of the state increased slightly over the month from 6.8 percent to 7.0 percent. Unlike other regions in the state, labor market activity in Western Maryland during October reflected increases in both the labor force and employment levels. Gains in employment, however, failed to keep pace with expansion in the labor force. As a result, an additional 150 people found themselves jobless during October. The region's jobless increase was restricted solely to Washington County where unemployment rose to 6.4 percent in October, up from 6.1 percent in September.

BALANCE OF STATE

Joblessness on the Eastern Shore and in Southern Maryland left 5.6 percent of the region's work force idle during October, up from 5.3 percent in September. The economic diversity in the region was apparent in the movement of local jobless rates over the month. Worcester, one of the counties in the region most affected by seasonal employment changes, experienced a large, yet typical, increase in joblessness. With slightly more than 400 workers joining the ranks of the unemployed during October, the county's unemployment rate rose sharply from 4.5 percent to 7.4 percent.

LOCAL UNEMPLOYMENT RATES--OCTOBER 1990



NONAGRICULTURAL PAYROLL EMPLOYMENT* BY INDUSTRY - BY PLACE OF EMPLOYMENT
(in thousands)
BY REGION--OCTOBER 1990

Major Industry Grouping	BALTIMORE METROPOLITAN AREA		MARYLAND PORTION D.C. SUBURBS		WESTERN MARYLAND		BALANCE OF STATE	
	Oct.1990	Sept.1990	Oct.1990	Sept.1990	Oct.1990	Sept.1990	Oct.1990	Sept.1990
Total Nonagricultural Employment	1,159.0	1,155.2	788.5	786.3	93.3	92.4	145.7	150.2
Goods Producing	205.2	206.1	108.8	109.7	23.5	23.3	35.0	35.3
Mining	0.3	0.3	0.5	0.5	0.7	0.7	0.2	0.2
Construction	78.2	78.4	71.1	72.1	7.0	6.9	10.4	10.5
Manufacturing	126.7	127.4	37.2	37.1	15.8	15.7	24.4	24.6
Durable Goods	69.8	70.4	18.8	18.7	7.3	7.3	9.3	9.3
Nondurable Goods	56.9	57.0	18.4	18.4	8.5	8.4	15.1	15.3
Service Producing	953.8	949.1	679.7	676.6	69.8	69.1	110.7	114.9
Transportation & Public Utilities	58.0	57.5	32.7	32.3	5.4	5.4	8.0	8.1
Trade	279.8	282.0	200.3	200.7	25.6	25.6	37.7	41.0
Wholesale Trade	67.6	68.1	35.5	35.4	4.4	4.4	6.1	6.1
Retail Trade	212.2	213.9	164.8	165.3	21.2	21.2	31.6	34.9
Finance, Insurance, & Real Estate	76.7	76.9	45.8	46.0	3.3	3.3	5.2	5.3
Services	323.6	323.3	228.9	229.2	20.3	20.3	32.7	34.3
Total Government	215.7	209.4	172.0	168.4	15.2	14.5	27.1	26.2
Federal	55.5	56.0	74.4	74.5	1.9	1.9	6.9	6.9
State	67.3	67.0	21.4	20.2	4.9	4.9	5.7	5.3
Local	92.9	86.4	76.2	73.7	8.4	7.7	14.5	14.0

*The count is of jobs, not workers. It includes full and part-time wage earners employed during pay period including the 12th of the month.

NOTE: Figures may not add to totals due to rounding.

Additional industry detail available upon request. Current data preliminary; previous month revised.

Prepared in conjunction with the U.S. Department of Labor, Bureau of Labor Statistics.

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STATE OF MARYLAND
CIVILIAN LABOR FORCE, EMPLOYMENT, AND UNEMPLOYMENT
BY PLACE OF RESIDENCE

OCTOBER 1990

AREA	CIVILIAN LABOR FORCE		EMPLOYMENT		UNEMPLOYMENT		UNEMPLOYMENT RATE		
	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCTOBER	SEPTEMBER*	OCT. 1989
MARYLAND	2,529,766	2,545,139	2,415,824	2,431,267	113,942	113,872	4.5	4.5	3.3
BALTIMORE METROPOLITAN AREA	1,210,265	1,214,587	1,151,519	1,155,564	58,746	59,023	4.9	4.9	3.5
BALTIMORE CITY	345,209	346,521	319,454	320,577	25,755	25,944	7.5	7.5	5.6
ANNE ARUNDEL	215,427	216,043	208,010	208,741	7,417	7,302	3.4	3.4	2.3
BALTIMORE	392,701	394,465	376,052	377,373	16,649	17,092	4.2	4.3	3.1
CARROLL	63,087	63,329	61,031	61,245	2,056	2,084	3.3	3.3	2.0
HARFORD	83,471	83,566	79,985	80,265	3,486	3,301	4.2	4.0	3.4
HOWARD	94,514	94,778	91,592	91,914	2,922	2,864	3.1	3.0	1.7
QUEEN ANNE'S	15,857	15,887	15,396	15,450	461	437	2.9	2.8	2.4
D. C. AREA	1,000,140	1,006,515	964,355	970,531	35,785	35,984	3.6	3.6	2.4
CALVERT	23,420	23,544	22,392	22,536	1,028	1,008	4.4	4.3	2.9
CHARLES	47,518	47,686	45,942	46,236	1,576	1,450	3.3	3.0	2.0
FREDERICK	77,917	78,571	74,217	74,692	3,700	3,879	4.7	4.9	2.3
MONTGOMERY	428,622	431,066	416,360	419,027	12,262	12,039	2.9	2.8	2.1
PRINCE GEORGE'S	422,664	425,646	405,444	408,040	17,220	17,606	4.1	4.1	2.9
WESTERN MARYLAND	105,892	105,646	98,525	98,428	7,367	7,218	7.0	6.8	5.6
ALLEGANY	32,709	32,829	30,228	30,271	2,481	2,558	7.6	7.8	6.4
GARRETT	12,676	12,809	11,684	11,782	992	1,027	7.8	8.0	5.5
WASHINGTON	60,507	60,008	56,613	56,375	3,894	3,633	6.4	6.1	5.2
BALANCE OF STATE	213,469	218,392	201,424	206,744	12,045	11,648	5.6	5.3	4.6
CAROLINE	14,285	14,534	13,644	13,926	641	608	4.5	4.2	2.9
CECIL	35,966	35,874	33,703	33,661	2,263	2,213	6.3	6.2	5.6
DORCHESTER	18,230	18,265	17,123	17,131	1,107	1,134	6.1	6.2	4.9
KENT	9,722	9,746	9,224	9,254	498	492	5.1	5.0	6.8
ST. MARY'S	42,209	42,033	40,250	40,003	1,959	2,030	4.6	4.8	3.9
SOMERSET	12,986	13,085	11,969	12,050	1,017	1,035	7.8	7.9	4.9
TALBOT	18,179	18,148	17,274	17,298	905	850	5.0	4.7	4.8
WICOMICO	40,965	41,240	38,849	39,088	2,116	2,152	5.2	5.2	3.9
WORCESTER	20,927	25,467	19,388	24,333	1,539	1,134	7.4	4.5	5.7
UNITED STATES [1]	125,020,000	124,779,000	118,299,000	117,961,000	6,722,000	6,818,000	5.4	5.5	5.0

*Estimates for the state are revised.

[1] Source: U. S. Department of Labor, Bureau of Labor Statistics

NOTE: Figures may not add due to rounding. These are estimates relating to the week of the 12th of each month. The count is of persons not jobs. All data are not seasonally adjusted.

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